



# HRIS Job Role Training

**Job Change**  
Forms: XP52

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## Introduction

HRIS requires that a personnel action be performed any time an employee changes jobs and/or positions. A job change may be used for the following types of changes:

- Transfers
- Promotion/demotion
- Position change, reversion
- Mobility assignment
- Detail to special duty
- Voluntary grade decrease
- Reclassification

Processing job changes accurately ensures that an employee receives the correct position defaults and pay for the job/position in which he/she performs. The Human Resources (HR) Initiator/Approver performs the personnel action using the Individual Action Form (XP52.1). The JOB CHANGE action may require that a JOB CHNG 2 be performed; depending upon the type of change. **Both the JOB CHANGE and the JOB CHNG 2 actions must have the same Effective Date.**

See the "Job Change Form" in the file, HRIS Forms, for a working template to use.

JOB CHANGE actions can be completed through close of business on Monday of compute week. Keying of JOB CHANGE actions can resume on Wednesday morning after compute Tuesday. HR and Payroll need to coordinate all actions affecting employee's pay to ensure the actions are processed and paid accurately.

JOB CHANGE personnel actions are entered into pending status and then updated nightly. If the action has a future effective date, the action will not process until the nightly run of the effective date of the action.

### Notes

- You cannot exceed the maximum of the grade range for a Job Change. Transactions of this nature will error out during the nightly batch. If a salary will put the employee over the max, the Agency HR Manager must first perform the Pay Range Maximum Override; then the Job Change can be processed.
- On XP52.1 - If Employee information appears in the "Current Value" column that you want removed on the Employee record, you must type "\*\*BLANK" in the "Change To" column.
- If the position is changing, you will need to click on "Fill Defaults" to populate the position default information onto the action, e.g., supervisor, process level, department, etc. **DO NOT KEY POSITION DEFAULT INFORMATION on the XP52.**

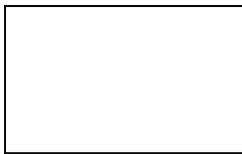
- If the FTE changes, the status code should match, as well as the Annual Leave Plan, Sick Leave Plan and Work Schedule.
- When processing a personnel action, HRIS requires that a Reason Code be supplied for the action being performed. HRIS displays the results of all processed personnel actions on various management reports. Detailed information (if required) can be displayed by running the report based on selected Reason Codes.
  - **Example** - An Agency processes a Job Change on an Employee with the reason code "JC-MOBIL". Management requests a report that displays a list of all Employees receiving a Job Change because of a Mobility Assignment within that Agency over the last 6 months. The report would be run using the reason code of "JC-MOBIL".
- A created time record in HRIS is like a snapshot of the Employee's information at that moment in time. If information is changed (could be the result of a personnel action - Job Change) and is reflected on the *Employee Master Record (HR11.1)* after the creation of the Employee's time record for that pay period, those changes will not get picked up on the existing time record. The time record will have to be deleted and re-added by your Agency Payroll Office to reflect the job change.
  - **Example** - The Agency Timekeeper enters Employee time records on Thursdays. A specific Employee within that batch received a promotion (which included a salary increase) that took effect on the first day of the current pay period but was not entered until after the time record was added. The salary increase will not be reflected on the time record entered by the Agency Timekeeper. The time record must be deleted and re-added to reflect the change on the paycheck.

# HRIS Job Change Chart

Required forms appear as:



Optional forms appear as:



Receive paperwork notifying Agency HRI of Job Change

Process XP52.1 - Individual Action JOB CHANGE (Required)

Page 6

Process XP52.1 - Individual Action JOB CHNG 2

Page 19

Process HR20.1 - Additional Contact Numbers (Optional)

Process PA12.1 - Emergency Contact (Optional)

Steps are covered in the Agency HR Initiator – General Employee Information Training

Process ZH12 Email and Work Phone Maintenance

Step is covered in the Agency Phone/Email Maintenance Specialist Training – Email and Work Phone Maintenance Training.

# Individual Action (XP52.1) Parameters Tab (JOB CHANGE)

Lawson portal - Individual Action (XP52.1) - Windows Internet Explorer

http://h5-lsf9.azdoa.gov/lawson/portal/

File Edit View Favorites Tools Help

Lawson portal - Individual... Lawson portal - ZH201.prt (J... Lawson portal - Position (XP0...

Welcome Patricia [logout]

## Individual Action (XP52.1)

XP52.1

>> Add Change Delete Previous Inquire Next | Inquire

2 Company STATE OF ARIZONA Last Change 06/14/2008

3 Employee 104279 BENALLY, CRYSTAL

4 Action, Nbr JOB CHANGE JOB CHANGE 1 OF 2

5 Effective 11/01/2008 Reasons JC-JOBCHG Comments

Parameters Selected Items 1 Selected Items 2 Selected Items 3

Main Special Processing U.S. - COBRA

Immediate  No

Anticipated End Date

Update Benefits

Update Absence Management

Update Required Deductions

Old Deduction End Date

New Deduction Begin Date

Currency Calculation

Inquiry Complete, add new values

start Novell-delivered ... Novell GroupWis... HR Initiator Job Change Trai... Lawson portal - I... 8:42 AM



### Individual Action (XP52.1)

Welcome Patricia [logout]

XP52.1

- Home
- Your Employee Services
  - Benefits
  - Employee Training
  - Leave Balances
  - Pay
  - Personal Information
  - Help/Change Password
  - Time Entry
- Manager Self-Service

>> Add Change Delete Previous Inquire Next Inquire

Company  STATE OF ARIZONA Last Change 06/14/2008  
 Employee  BENALLY, CRYSTAL  
 Action, Nbr  JOB CHANGE 1 OF 2  
 Effective  Reasons

Parameters Selected Items 1 Selected Items 2 Selected Items 3

Main Special Processing U.S. - COBRA

8	Immediate	<input type="checkbox"/>	Yes
9	Anticipated End Date	<input type="text"/>	
10	Update Benefits	<input type="checkbox"/>	Yes
11	Update Absence Management	<input type="checkbox"/>	
12	Update Required Deductions	<input type="checkbox"/>	Yes
13	Old Deduction End Date	<input type="text"/>	
14	New Deduction Begin Date	<input type="text"/>	

R=Required, O=Optional

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	<b>Notes/ Additional Information</b>
1	White Search Box	R	Type XP52.1 in the White Search Box. Press ENTER on the keyboard.	The Individual Personnel Action (XP52.1) opens.	
2	<b>Company</b> Field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	<b>Employee</b> Field	R	Type the Employee's EIN.	System will bring up needed information from the employee's record.	You must enter the correct EIN.
4	<b>Action Nbr</b> Field	R	Type or use the Drop Down to enter action ' <b>JOB CHANGE</b> '.	Based on the Action Nbr. selected the system will populate the appropriate fields that are needed to complete this action.	
5	<b>Effective</b> Field	R	Type the Effective Date of the action.	The Effective Date of the Job Change will be in this field.	Date is formatted as MMDDYY
6	<b>Reasons –</b> First Box Field	R	Type or use the Drop Down to enter the reason code for the Job Change Action.		One reason code is required. The reason codes are smart coded. *Refer back to basics for more information on Reason Codes.
	<b>Reasons -</b> Second Box Field	O	Type or use the Drop Down to enter the 2 <sup>nd</sup> Reason Code for the Job Change.		The 2 <sup>nd</sup> Reason Code is not required but is recommended to better define the reason for the Job Change Action. It can be useful for reporting purposes.
7	<b>Inquire</b> Button	R	Click Inquire	You should get message "Inquiry Complete, add new values" in the lower left corner.  The system will populate the required fields that are needed and will default all information from the Employee's record.	DO NOT CLICK Add at this point!
8	<b>Immediate</b> Field	R	Type N or select 'No' from the drop down menu in the Immediate Field.	Action will process with the nightly batch depending on the effective date of the action.	<b>ONLY New Hire and Rehire Actions are processed immediately.</b> All other HRIS Actions are processed during the nightly batch.
9	<b>Anticipated End</b> Field	R	Leave Blank	This field must be blank.	
10	<b>Update Benefits</b> Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	Whether the employee is eligible for benefits or not, a 'Y' must be put in this field.

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	 <b>Notes/ Additional Information</b>
11	<b>Update Absence Management Field</b>	R	Leave Blank	This field must be blank.	
12	<b>Update Required Deductions Field</b>	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	
13	<b>Old Deduction End Date Field</b>	R	Leave Blank	When the action is processed the system will default in the correct date.	
14	<b>New Deduction Begin Date Field</b>	R	Leave Blank	When the action is processed the system will default in the correct date.	

# Individual Action (XP52.1) Selected Items 1 Tab (JOB CHANGE)

Lawson portal - Individual Action (XP52.1) - Windows Internet Explorer

http://h5-lsf9.azdoa.gov/lawson/portal/

File Edit View Favorites Tools Help

Lawson portal - Individual... Lawson portal - ZH201.prt (J... Lawson portal - Position (XP0...

Welcome Patricia [logout]

XP52.1

**HRIS State of Arizona**

**Individual Action (XP52.1)**

Home >> Add Change Delete Previous Inquire Next | Fill Defaults

Your Employee Services

- Benefits
- Employee Training
- Leave Balances
- Pay
- Personal Information
- Help/Change Password
- Time Entry

Manager Self-Service

Company: STATE OF ARIZONA

Employee: 104279 BENALLY, CRYSTAL

Action, Nbr: JOB CHANGE JOB CHANGE 1 OF 2

Effective: 11/01/2008

Reasons: JC-JOBCHG

Last Change 06/14/2008

Comments

Parameters	Selected Items 1	Selected Items 2	Selected Items 3
Data Item	Current Value	Change To	
Status	T2		
Position	ADC005760AAN		
Job Code	ACV39003		
Process Level	DC24W		
Department	24WH0		
Location	PAYROLL		
Supervisor	DC24W80404		
User Level	DCWH-24		
Salary Class	H		
Rate of Pay	17.0194		
Schedule	ACO		
Grade	01		

Inquiry Complete, add new values

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	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	<b>Selected Items 1</b>	R	Click on the <b>Selected Items 1</b> tab.	The Selected Items 1 section will appear with the necessary fields to be populated.	Information that was imported from Employee's record will appear in the Current Value Field.
2	<b>Company</b> field <b>Employee</b> Field <b>Action, Nbr</b> Field <b>Effective Date</b> Field <b>Reasons</b> Fields	R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
3	<b>Status</b> Field	R	Type or Select from the drop down the Employee's <b>NEW</b> Status.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		To access the drop down menu, click the V at the end of the Selected Value field.  *If status changes, be certain to see if Annual Leave Plan, Sick Leave Plan, and FTE fields need updating. These fields are found on Selected Items 2.
4	<b>Position</b> Field	R	Type the Employee's <b>NEW</b> Position Number  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to step 6		
5	<b>Fill Defaults</b> button	R	Click <b>Fill Defaults</b>	All information related to the position will be defaulted in.  You will receive the message 'Review defaulted fields'.	<b>THIS IS VERY IMPORTANT.</b> Let the system default the information in from the position.
6	<b>Job Code</b> Field <b>Process Level</b> Field <b>Department</b> Field <b>Location</b> Field <b>Supervisor</b> Field <b>User Level</b> Field <b>Salary Class</b> Field	R R R R R R R	Leave default information in these fields. No Action Required.	All information needed from the position will be defaulted in.	This is very important. Let the system default the information in from the position. If the information that defaulted in is not accurate, the information <b><u>must be changed on the position, not the employee.</u></b>

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
7	Rate of Pay Field	R	Type the NEW Rate of Pay for the Employee in the Change to field.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		Format for Rate of Pay '00.0000'  If the Rate of Pay is changing and the Employee is in a Grade Range Schedule, enter the NEW Rate of Pay.  Selecting the "P" button opens a form window where a % increase or decrease can be entered. Select the "Calculate" button to view the new pay rate. Select "Done" to close the form. The calculated new pay rate is then displayed in the "new value" field for the pay rate.  For employees in a Step & Grade Schedule, this field <u>MUST</u> be blank.
8	Schedule Field Grade Field	R R	Leave default information in these fields. No Action Required.	All information needed from the position will be defaulted in.	This is very important. Let the system default the information in from the position. If the information that defaulted in is not accurate, the information <b><u>must be changed on the position not the employee.</u></b>  DO NOT CLICK Add at this point – go to Selected Items 2

# Individual Action (XP52.1) Selected Items 2 Tab (JOB CHANGE)

Lawson portal - Individual Action (XP52.1) - Windows Internet Explorer

http://h5-lsf9.azdoa.gov/lawson/portal/

File Edit View Favorites Tools Help

Lawson portal - Individual... Lawson portal - ZH201.prt (J... Lawson portal - Position (XP0...

Welcome Patricia [logout]

XP52.1

**HRIS State of Arizona**

**Individual Action (XP52.1)**

>> Add Change Delete Previous Inquire Next Inquire

Your Employee Services

- Benefits
- Employee Training
- Leave Balances
- Pay
- Personal Information
- Help/Change Password
- Time Entry

Manager Self-Service

Company: 1 STATE OF ARIZONA  
 Employee: 104279 BENALLY, CRYSTAL  
 Action, Nbr: JOB CHANGE JOB CHANGE 1 OF 2  
 Effective: 11/01/2008  
 Reasons: JC-JOBCHG  
 Last Change: 06/14/2008

Parameters Selected Items 1 Selected Items 2 Selected Items 3

Data Item	Current Value	Change To
Step	3	
FTE	1.000000	
Shift	1	
Exempt From Overtime	N	
Pay Plan	NEXP	
EDUCATION		
RETIREMENT CODE	0	
Annual Hours	2080	
ANNUAL LEAVE PLAN	COVERED	
SICK LEAVE PLAN	STANDARD	
Work Schedule	8 HR M-FR	
EEO-4 Group	11	

Inquiry Complete, add new values

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	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	<b>Selected Items 2</b> Link	R	Click on the ' <b>Selected Items 2</b> ' tab.	The Selected Items 2 section will appear with the necessary field to be populated.	Information that appeared on the Employee's record will default in.
2	<b>Company</b> Field <b>Employee</b> Field <b>Action, Nbr</b> Field <b>Effective Date</b> Fld <b>Reasons</b> Fields	R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
3	<b>Step</b> Field	O	This field must be filled in IF the employee is in a Step & Grade Schedule.	All information needed from the position will be defaulted in.	The Step will drive the rate of pay for time entry and salary history.
4	<b>FTE</b> Field	R	Enter the employee's NEW FTE.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		Full time =1.0, ¾ time = .75, ½ time = .50, and ¼ time = .25 These are the only acceptable values.  NOTE: The FTE works with the time accrual plans and employee status. These fields must match or time accruals will not work.
5	<b>Shift</b>	R	Enter the employee's NEW Shift.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		Valid codes are 1 – day shift, 2 – second, swing or evening shift, 3 – night or graveyard shift. <b>Shift 2 and 3 will drive the Shift Differential Pay.</b>
6	<b>Exempt from Overtime</b> Field <b>Pay Plan</b> Field	R R	Leave default information in these fields. No Action Required.	All information needed from the position will be defaulted in.	This is very important. Let the system default the information in from the position. If the information that defaulted in is not accurate, the information <b><u>must be changed on the position not the employee.</u></b>
7	<b>EDUCATION</b> field	O	Select the Education field as applicable for your agency.		This is an Optional Field. Field is not used by all agencies. If your agency does not have an Educational Stipend, do not enter data into this field.
8	<b>RETIREMENT CODE</b> field	R	Enter the employee's NEW Retirement Code.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		To access the drop down menu, click the V at the end of the Selected Value field.  The Retirement code determines the retirement system eligibility and deduction.

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	<b>Notes/ Additional Information</b>
9	<b>Annual Hours</b> field	R	Leave default information in these fields. No Action Required.	All information needed from the position will be defaulted in.	This is very important. Let the system default the information in from the position. If the information that defaulted in is not accurate, the information <b><u>must be changed on the position not on the employee.</u></b>
10	<b>ANNUAL LEAVE PLAN</b> Field	R	Type or Select from the Drop Down the NEW Annual Leave Plan for the Employee.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		The employee must be placed in an Annual Leave plan appropriate to their status and FTE or their time accruals will not work correctly.  Example: Employee is a covered ½ time employee they should be in the Covered ½ time Annual Leave Plan.
11	<b>SICK LEAVE PLAN</b> Field	R	Type or Select from the Drop Down the NEW Sick Leave Plan for the Employee.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		The employee must be placed in a Sick Leave plan appropriate for their status and FTE or their time accruals will not work correctly.  Example: Employee is a covered ½ time employee they should be in the Covered ½ time Sick Leave Plan.
12	<b>Work Schedule</b> Field	R	Type or select from the drop down menu the Employee's appropriate NEW work schedule.		 <b>Note:</b> This field affects the Employee's time entry form, how the payroll time will default on the XR32.2 – Payroll Time Entry form.
13	<b>EEO-4 Group</b> Field	R	Type the EEO-4 Functional Group for your agency  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		Valid Values are 01, 02, 03, 04, 06, 08, 09, 10, 11, 12, 14, 15, (99 for Elected Officials ONLY).  See the EEO-4 Functional Groups Document to find the appropriate value for your agency. (Check the JOB CHNG 2 action and change the "Exclude From EEO-4" field, if necessary.)  DO NOT CLICK Add at this point – go to Selected Items 3

# Individual Action (XP52.1) Selected Items 3 Tab (JOB CHANGE)

Lawson portal - Individual Action (XP52.1) - Windows Internet Explorer

http://h5-lsf9.azdoa.gov/lawson/portal/

File Edit View Favorites Tools Help

Lawson portal - Individual... X Lawson portal - ZH201.prt (J... Lawson portal - Position (XP0...

Welcome Patricia [logout]

XP52.1

**Individual Action (XP52.1)**

Home >> Add Change Delete Previous Inquire Next | Inquire

Your Employee Services

- Benefits
- Employee Training
- Leave Balances
- Pay
- Personal Information
- Help/Change Password
- Time Entry

Manager Self-Service

Company: 1 STATE OF ARIZONA  
 Employee: 104279 BENALLY, CRYSTAL  
 Action, Nbr: JOB CHANGE JOB CHANGE 1 OF 2  
 Effective: 11/01/2008  
 Reasons: JC-JOBCHG  
 Last Change: 06/14/2008

Parameters Selected Items 1 Selected Items 2 Selected Items 3

Data Item	Current Value	Change To
AGENCY HIRE DATE	01/02/2006	
JOB CODE HIRE DATE	03/11/2006	
STATUS TERM DATE		
Expense Dist Co	1000	
Expense Acct Unit	DC21130	
Expense Account	6011	
Expense Subaccount	2009	
Activity	DC74202	
Account Category	ZZZZZ	
Security Level	9	
Security Location	9999999999	
Adjusted Hire Date	01/02/2006	

Inquiry Complete, add new values

Novell iPrint Client Document printed successfully

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	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	<b>Selected Items 3</b>	R	Click on the <b>Selected Items 3</b> tab.	The Selected Items 3 section will appear with the necessary field to be populated.	Information that was imported from the Employee's record will default in.
2	<b>Company</b> field <b>Employee</b> Field <b>Action, Nbr</b> Field <b>Effective Date</b> Fld <b>Reasons</b> Fields	R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
3	<b>AGENCY HIRE DATE</b> field	O	Type the NEW Agency Hire Date, if applicable. **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		This is an optional date field. Key the date the Employee starts with the Agency.  Date format is MMDDYY.
4	<b>JOB CODE HIRE DATE</b> field	O	Type the NEW Job Code Hire Date.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		This is an optional date field.  This is the date the employee was hired into the current Job Code.  Date format is MMDDYY.
5	<b>STATUS TERM DATE</b> field	R / O	Type the NEW Status Term Date, if applicable for the Employee Status.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		Enter a date in this field if the employee is put in a status that is due to change by/on a certain date. Examples - Mobility, Probationary Status, Detail to Special Duty, etc.
6	<b>Expense Dist Co</b> Field <b>Expense Acct Unit</b> Field <b>Expense Account</b> Field <b>Expense Sub-Account</b> Field <b>Activity</b> Field <b>Account Category</b> Field <b>Security Level</b> field <b>Security Location</b> field	R R R R R R R R R	Leave default information in these fields. No Action Required.	All information needed from the position will be defaulted in.	This is very important. Let the system default the information in from the position. If the information that defaulted in is not accurate, the information <b><u>must be changed on the position, not the employee.</u></b>

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	<b>Notes/ Additional Information</b>
7	<b>Adjusted Hire Date</b> field	R	Type the NEW Adjusted Hire Date  If value has not changed, no entry is required in the Change to field.		Date format is MMDDYY.  <u>Contact the HRIS Help Desk Payroll Option</u> to correct the dates eligible for time accrual. If you do not, the employee will not accrue at the correct rate.
8	<b>Add</b> button	R	Click Add	Message in lower left corner "Add Complete; continue."	

# Individual Action (XP52.1) Parameters Tab (JOB CHNG 2)

Lawson portal - Individual Action (XP52.1) - Windows Internet Explorer

http://h5-lsf9.azdoa.gov/lawson/portal/

File Edit View Favorites Tools Help

Lawson portal - Individual... Lawson portal - ZH201.prt (J... Lawson portal - Position (XP0...

Welcome Patricia [logout]

## Individual Action (XP52.1)

XP52.1

>> Add Change Delete Previous Inquire Next | Inquire

2 Company 1 STATE OF ARIZONA Last Change 06/14/2008

3 Employee 104279 BENALLY, CRYSTAL

4 Action, Nbr JOB CHNG 2 JOB CHANGE 2 OF 2

5 Effective 11/01/2009 Reasons JC-JOBCHG Comments

Parameters Selected Items 1 Selected Items 2 Selected Items 3

Main Special Processing U.S. - COBRA

Immediate N No

Anticipated End Date

Update Benefits

Update Absence Management

Update Required Deductions

Old Deduction End Date

New Deduction Begin Date

Currency Calculation

Inquiry Complete, add new values

start Novell-delivered ... Novell GroupWis... HR Initiator Job Change Trai... Lawson portal - I... 8:54 AM



### Individual Action (XP52.1)

Welcome Patricia [logout]

XP52.1

- Home
- Your Employee Services
  - Benefits
  - Employee Training
  - Leave Balances
  - Pay
  - Personal Information
  - Help/Change Password
  - Time Entry
- Manager Self-Service

>> Add Change Delete Previous Inquire Next | Inquire

Company  STATE OF ARIZONA Last Change 06/14/2008  
 Employee  BENALLY, CRYSTAL  
 Action, Nbr  JOB CHANGE 2 OF 2  
 Effective  Reasons

Parameters Selected Items 1 Selected Items 2 Selected Items 3

Main Special Processing U.S. - COBRA

9	Immediate	<input type="text" value="N"/>	No
10	Anticipated End Date	<input type="text"/>	
11	Update Benefits	<input type="text" value="Y"/>	Yes
12	Update Absence Management	<input type="text"/>	
13	Update Required Deductions	<input type="text" value="Y"/>	Yes
14	Old Deduction End Date	<input type="text"/>	
	New Deduction Begin Date	<input type="text"/>	

R=Required, O=Optional

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	 <b>Notes/ Additional Information</b>
1	White Search Box	R	Type XP52.1 in the White Search Box. Press ENTER on the keyboard.	The Individual Personnel Action (XP52.1) opens.	
2	<b>Company</b> Field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	<b>Employee</b> Field	R	Type the Employee's EIN.	System will bring up needed information from the prior two actions.	You must enter the correct EIN.
4	<b>Action Nbr</b> Field	R	Type or use the Drop Down to enter action ' <b>JOB CHNG 2</b> '.	Based on the Action Nbr. selected the system will populate the appropriate fields that are needed to complete this action.	
5	<b>Effective</b> Field	R	Type the Effective Date of the action.	The Effective Date of the Job Change will be in this field.	Date is formatted as MMDDYY.  Effective date <b>must</b> be the SAME date as the date used in the JOBCHNG action.
6	<b>Reasons</b> – First Box Field	R	Type or use the Drop Down to enter the reason code for the Job Change Action.		One reason code is required. The reason codes are smart coded. *Refer back to basics for more information on Reason Codes.
	<b>Reasons</b> - Second Box Field	O	Type or use the Drop Down to enter the 2 <sup>nd</sup> Reason Code for the Job Change.		The 2 <sup>nd</sup> Reason Code is not required however it can be used to better define the reason for the Job Change Action. It can be useful for reporting purposes.
7	<b>Inquire</b> Button	R	Click Inquire	You should get message "Inquiry Complete, add new values" in the lower left corner.  The system will populate the required fields that are needed and will default all information from the Employee's record.	DO NOT CLICK Add at this point!
8	<b>Immediate</b> Field	R	Type N or select 'No' from the drop down menu in the Immediate Field.	Action will process with the nightly batch depending on the effective date of the action.	<b>Only New Hire and Rehire actions are processed immediately.</b> All other HRIS Actions are processed during the nightly batch.
9	<b>Anticipated End</b> Field	R	Leave Blank	This field must be blank.	

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	<b>Notes/ Additional Information</b>
10	<b>Update Benefits</b> Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	Whether the employee is eligible for benefits or not, a 'Y' must be put in this field.
11	<b>Update Absence Management</b> Field	R	Leave Blank	This field must be blank.	
12	<b>Update Required Deductions</b> Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	
13	<b>Old Deduction End Date</b> Field	R	Leave Blank	When the action is processed the system will default in the correct date.	
14	<b>New Deduction Begin Date</b> Field	R	Leave Blank	When the action is processed the system will default in the correct date.	



	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	<b>Selected Items 1</b>	R	Click on the <b>Selected Items 1</b> tab.	The Selected Items 1 section will appear with the necessary fields to be populated.	Information that was imported from Employee's record will appear in the Current Value Field.
2	<b>Company</b> field <b>Employee</b> Field <b>Action, Nbr</b> Field <b>Effective Date</b> Field <b>Reasons</b> Fields	R R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
3	<b>Badge Code</b> Field	O	Type in the Employee's NEW Badge Code if applicable for your agency.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		This is an optional field.
4	<b>DPS-SDA</b> Field	O	This is an optional field used by specific agencies.		
5	<b>OTHER EMPLOYEE ID#</b> Field	O	Type the NEW Other Employee ID# if applicable for your agency.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		
6	<b>Hire Source</b> Field	O	**If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		This is an optional field.
7	<b>UNDER/OVER FILL</b> Field	O	If the Employee is an Under or Over fill, key or use the drop down to enter the Under/Over fill.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		This field must be completed if the Employee is in an Under/Over fill position.  See Job Aid--HRIS Instructions for Overfill/ Underfill.
8	<b>Seniority Date</b> Field	O	The Seniority Date will default from the Employee's record.  **If information displayed in the <b>Current Value</b> Field is correct, no entry is required. Skip to next step.		The Seniority Date drives AUTOPAYADV actions for Correctional Officers.
9	<b>Exclude From EEO-4</b> Field	R	Type in a "Y" or "N" as appropriate.		In most cases, an employee will have "N" in this field.
10	<b>Add</b> button	R	Click Add	Message in lower left corner "Add-Complete; continue".	